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January 23, 1989

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Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Skincare faces new products

By PAT SLOAN

Noxell Corp. and Cosmair will try to skin the competition in the $1.6 billion-plus facial skincare market with new lines under the Clarion and Plenitude brands.

The two lines will be priced competitively with Almay and other Revlon entries.

Noxell will introduce Clarion skincare in April. Cosmair will follow in September with Plenitude, the leading mass-market skincare line in France.

Advertising for Clarion's 13 skincare products will fit into the "Looking good and knowing it" theme first used on Clarion makeup last year (AA July 4). Leo Burnett USA, Chicago, handles Clarion.

Plenitude, a line of 12 products, will be marketed under the theme "Reduces signs of aging." Publicis, Paris, is handling.

Neither Noxell nor Cosmair would disclose ad spending for their introductions, but Cosmair executives said the Plenitude launch will represent its major mass-market effort for 1989.

The skincare introduction will help push Clarion's total ad spending up by more than 20%, said Steve Colnitis, marketing director for the brand. Last year, Noxell spent $20 million on Clar-

(Continued on Page 52)

INTV scraps its plan for ad 'network'

By WAYNE WALLEY

The giant "unwired" sales network planned by the Association of Independent Television Stations has come unplugged.

Fox Television Stations and Tribune Broadcasting Co., two of the country's largest independent station groups, apparently killed the INTV plan to take on the Big 3 networks for upfront sales.

Sources said the Fox stations group balked because an independent co-op would compete with Fox Broadcasting Co. for ad dollars. Tribune Broadcasting is said to have nixed the idea because of its involvement in other unwired networks.

Neither Fox nor Tribune Broadcasting returned phone calls.

INTV President Preston Padden said the organization needed unanimous support to unite independent stations on a non-exclusive basis before launching the project.

"It seems some of the largest station groups thought it was such a good idea they wanted to do it themselves instead of through an INTV-sponsored network co-op," Mr. Padden said.

At least seven so-called unwired networks now exist, created by third parties that buy commercial time on independent TV stations nationwide and then resell the time to advertisers at a markup.

"The biggest problem for INTV would have been coordination."

(Continued on Page 53)

Starting today:

AD AGE's new twice-monthly page devoted exclusively to sales promotion news—Page 24

How Reagan took America's pulse

©The Image Bank/C.L. Chrysain

'The Great Communicator' was a great listener of survey results

ADVERTISING AGE *research columnist Jack J. Honomichl last summer was given an exclusive look at eight years of ex-President Ronald Reagan's research data, compiled by Richard B. Wirthlin, the president's pollster and confidant. Mr. Honomichl is the first "outsider" to gain access to this information, and the following is an edited excerpt from one chapter of his yet-unpublished book, "Measuring America." It is the first look at the Reagan administration's unprecedented use of public opinion polling as an adjunct to policy-making.*

By JACK J. HONOMICHL

When the final appraisal of former President Ronald Reagan's leadership skills comes in, it may well conclude that one reason he was "The Great Communicator" was that he also was "The Great Listener."

The reason: a public opinion monitoring program of unprecedented scope that continuously fed Reagan and his advisers intimate knowledge of the American public's attitudes and opinions about world and national events during his eight years in office.

Through survey research—what the media refer to as "polling"—Reagan's White House listened to the "heartbeat" of more than 500,000 Americans in more than 500 surveys—a program unparalleled in scope or cost in presidential politics.

Conceived and managed by Richard B. Wirthlin, the former president's pollster and confidant, and funded by the Republican National Committee, these surveys probed just about every aspect of public affairs on a scale unmatched in U.S. history. What is even more important is that the surveys became an integral factor in President Reagan's decision-making.

For example, the surveys probed:

- The American public's knowledge of, and interest in, world events. Does the public really care, for instance, about what goes on in Israel? (About 19% of Americans didn't know about Israel, or not enough to have an opinion. Among those who did, Israel's popularity rating was 47 on a scale of 0 to 100, with 100 being "best possible" country. Canada's popularity rating, in contrast, was 72, which is extremely high, and Korea's was 42.)
- The awareness and popularity ratings of dozens of public personalities, ranging from Mikhail Gorbachev to Ted Kennedy, John Glenn, Dan Rather, Ted Koppel, the Rev. Jerry Falwell, Barbara Walters and First

(Continued on Page 25)

By Bob Garfield

Ad Review

Cheers for real winners of Super Bowl XXIII:

(Bud: ★ ★ ★ ½ Coke: ★ ★ ½)

Who won? Madison Avenue in a rout.

The advertising industry, if it can just this once muster some spontaneity, should spend the day doing the Ickey Shuffle. Sunday's TV spots scored at will. Apple Computer's "Lemmings" debacle can be forgotten at last. The Super Bowl TV Commercial Event, as the ultimate mass-marketing tool, is back.

I, for one, had feared that viewers had become resistant to the transparently manipulative techno-gimmick. But my fears were groundless. It is proved yet again that nobody ever went wrong overestimating the power of special effects on the American people.

Stunning commercials for Anheuser-Busch and Diet Coke unquestionably glued millions to their chairs. My suspicion is that viewing-audience pit stops were taken during championship play itself, either that or the game ball was the most gently treated bladder in America.

The Super Bowl TV Commercial Event is back, and two of the big winners were Anheuser-Busch's Bud Bowl I (l.) and Diet Coke's 3-D commercial, a TV first.

It was a day of advertising surprises but none so rewarding as the gridiron showdown between Budweiser and Bud Light. Everyone knew Bud Bowl I would be stupid, and it was. But you know what they say. . . . "On any given Sunday," and all that. This inaugural battle of the bottles was stupid and magnificent. Delightfully idiotic. Ridiculous and sublime.

The only way D'Arcy Masius Benton & Bowles, St. Louis, could make this work was to faithfully reproduce the look of an NFL game in all its silly pageantry and misplaced seriousness. The agency succeeded to a fare-thee-well.

From the protective collars on the long-neck linemen to the Bear Bryant hat on the Bud Light coach to the earnest, overexcited

(Continued on Page 56)

January 23, 1989

Advertising Age

Crain's International Newspaper of Marketing.

K mart's hyperactive

This offbeat vision of a "beautifully coordinated" bath and bed department appears in a new image campaign for American Fare, the first hypermarket developed by K mart and Bruno's.

No. 2 retailer braces for tough fight in '90s

By PATRICIA STRNAD and JUDITH GRAHAM

From hypermarkets to a massive co-op marketing blitz with *Family Circle* magazine, K mart Corp. is developing new strategies to battle fast-growing Wal-Mart Stores and other retailers.

On Jan. 29, K Mart will unveil its first American Fare hypermarket, a joint venture with Bruno's, a leading Southeastern grocery chain.

The new store, a 244,000-square-foot facility in Atlanta, combines food and general merchandise, and will carry "everyday low prices" on all 45,000 items in the store. The typical 86,500-square-foot K mart carries everyday low pricing on about 3,000 of its items.

An image campaign using TV, radio and print breaks in that area today via DiIorio, Wergeles, New York, a subsidiary of K mart agency Ross Roy Group, Bloomfield Hills, Mich.

February marks the kickoff of K mart's new $20 million "At home with Martha Stewart" ad and promotional campaign, in partnership with *Family Circle* (AA, Jan. 16).

Ms. Stewart, K mart's spokeswoman and lifestyle consultant, will use products sold at K mart

(Continued on Page 54)

Last Minute News

Chiat/Mojo deal in trouble?

SYDNEY—The deal to split up Mojo MDA Group between Chiat/Day and HDM Worldwide (AA, Jan. 16) may be threatened by George Patterson Pty., part of Backer Spielvogel Bates Worldwide and Australia's No. 1 agency. Patterson has expressed interest in buying Mojo MDA's second agency, Mattingly Pty., now planned to be sold by Chiat/Day to a venture between HDM and Mojo MDA directors. Patterson Chairman Geoffrey Cousins confirmed he first offered to buy Mattingly in September and renewed his bid when the Chiat/Day/Mojo merger was announced. He refused to value his offer. It's understood HDM's offer for Mattingly is worth about $30 million. The proposal to sell and split up Mojo MDA Group still needs stockholder

(Continued on Page 8)

HDM eyes buy

Y&R's Stone & Adler seeks suitor

By ALISON FAHEY

Stone & Adler, the Chicago-based direct-response agency owned by Young & Rubicam, is on the auction block and HDM Worldwide has emerged as the most likely buyer.

Stone & Adler President Craig Thomas said the agency is negotiating with several suitors but would only confirm talks with HDM, the international agency network owned jointly by Y&R, Dentsu and Eurocom.

A decision on the agency's fate could be reached early this week, Mr. Thomas said.

John Rindlaub, Y&R's corporate relations director, also confirmed discussions between HDM and Y&R but said, "It's far from a done deal."

Sources said Stone & Adler has had perennial problems competing with Wunderman Worldwide, New York, the nation's largest direct-response shop, which is also owned by Y&R.

Nevertheless, the agency picked up more than $15 million in new business last year, including Navistar Transportation Corp., Alabama Space & Rocket Center and Allergan, said Stanton Lewin, VP-account supervisor.

Yearend 1988 figures weren't available.

"We had a great 1988," said Stone & Adler's Mr. Thomas. "We're a hot agency right now . . . agencies have been approaching us" about a sale.

That's a welcome change from 1987, when Stone & Adler reported $75 million in billings, down almost 23% from 1986. That figure represented the combined billings of the Chicago office and Chapman Stone & Adler, the New York operation.

HDM is in the process of forming HDM Worldwide Direct Marketing Group, which will be the umbrella company for all its current HDM direct-response shops in Los Angeles,

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Highlights

NEWS

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The restaurant chain's new management tries to reverse recent declines by concentrating on a trimmer menu and a stronger family image.

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Once languishing on supermarket shelves, vegetable juices are showing renewed health.

36 Grey wins one, loses one
Grey Direct wins a piece of Pepsi but faces the loss of one of its founders.

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A new regional print campaign by George Dickel Tennessee Whisky characterizes its consumers' earthy style.

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Fox Broadcasting Co. is expanding its schedule to include prime-time programming on Mondays.

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53 A kinder & gentler FTC?
George Bush's transition team sounds out new candidates for the FTC chairmanship.

55 Burger King faces changes ahead
Grand Met wants its own people in key posts, which may involve another new marketing chief for Burger King.

INTERNATIONAL

50 Japanese push for creative media
The ad industry is striving to develop innovative forms of media in Japan to satisfy marketers' craving for new ideas.

New women's magazine seeks to steal first. P. 32.

SPECIAL REPORT: TV Syndication starts after P. 36.

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Philips moves to cut agency cancel period

By GARY LEVIN

Dutch-owned NV Philips, an Ogilvy & Mather client, is moving to significantly reduce the time frame of cancellation clauses in contracts with its ad agencies.

The move isn't tied to concerns that Ogilvy Group's stock may be "in play," but that may have helped trigger the Philips action.

"We want a clause in our contracts that allows us to sever the contract if the financial ownership or management of the agency changes quickly," said Rob Riphagen, director of corporate and consumer electronics marketing communications at the company's headquarters in Eindhoven, Netherlands.

Other agencies on the Philips roster are Publicis, Paris; and BBDO Worldwide; D'Arcy Masius Benton & Bowles; Lintas:Worldwide; and WPP Group's J. Walter Thompson Co., all New York.

O&M handles Philips' consumer electronic brands in 28 countries.

"We are discussing [shortening the cancellation time] with publicly owned and non-public advertising agencies," Mr. Riphagen said of the clauses, which typically are longer than the 90-day terms common among U.S. advertisers.

He didn't indicate what new time frame he's considering.

Ogilvy Group stock continued to trade at a furious pace last week as the names of a few potential bidders surfaced to help explain a persistent run-up in its price *(see related story, Page 54)*.

With nearly 700,000 shares traded during the week ended Jan. 20, Ogilvy stock reached $32, more than $5 above its price when trading first zoomed Jan. 9.

Other big O&M clients—such as American Express Co., Ford Motor Co. and Mattel—haven't indicated any concern about their cancellation clauses with the shop. An executive of one O&M client said any cancellation clause of less than 60 days would cause problems because it would take that long to close out media placements.

A spokesman for American Express, O&M's biggest worldwide client, said the company isn't troubled by a takeover threat.

"We're not concerned about the possibility because we haven't seen

(Continued on Page 54)

Bricklin plans car retail setup

By RAYMOND SERAFIN

Entrepreneur Malcolm Bricklin, fresh from bailing out of Global Motors' Yugo problems, is trying to establish the auto industry's first national retailing organization.

If successful, Bricklin Motors could control as many as 1,000 dealership points nationwide and ad budgets estimated at $20 million to $22 million in its first year and $80 million to $100 million in its second year, said Paul Lambert, a member of the company's "corporate roundtable" in charge of marketing.

The organization would operate like a Century 21-type real estate franchise, with national advertising stressing extra benefits to consumers—such as a wider range of brands, 24-hour service and entertainment-oriented sales techniques.

Bricklin Motors hasn't decided how to assign its advertising, though one possibility is to acquire regional agencies. A portion of each dealer's ad budget would go into a fund to create an overall image for the Bricklin Motors name.

Financial backing for the venture is being arranged by investment banker L.F. Rothschild, Unterberg Towbin, with Printon Kane Capital Corp. serving as financial adviser on the estimated $2 billion undertaking, according to *Automotive News*.

Mr. Lambert said Bricklin Motors intends to implement innovative techniques in its dealerships, including the use of a special-effects-filled show developed by Technifex Inc. The computerized sales pitch, available to each salesman in his "closing booth," features 3-D representations of characters, including celebrities, addressing prospective car buyers on relevant subjects.

Bricklin Motors also plans a compensation system for salesmen, service department workers and others based on customer satisfaction goals.

The operation intends to start by buying controlling interest in 10 megadealers in different regions of the country within six months. An announcement of the first purchase could come before the end of this month.

Using those as a base, the plan is to expand to 100 to 200 dealer points by the second year and 1,000 dealer points by the third year.

Mr. Bricklin has been involved in several automotive ventures, dating back to his founding of Subaru of America in 1968. He founded Global, parent company of Yugo America, but sold his interest to a private investment group last April.

Mr. Lambert is president of Lambert/Dale, New York, which is still agency of record for Yugo America.

Earlier, Mr. Lambert said that Yugo is "millions of dollars" in debt to media and vendors (AA, Jan. 2). He declined to comment on prospects for a split with Yugo America, importer and distributor of the Yugoslavian-built line.

Financially strapped Global Motors has been openly searching for new investment backing.#

V-8 power boosts veggie juices

By JUDANN DAGNOLI

Vegetable juices, languishing on supermarket shelves just three years ago, are showing some renewed health.

Although still a comparatively small segment of the overall juice category, blended vegetable juices experienced a hearty 26.4% jump in sales last year to $237.8 million, according to SAMI/Burke.

Marketers in the past have left the field to Campbell Soup Co.'s V-8, but now they're starting to take notice. J.M. Smucker Co. is testing Hearty Vegetable Juice, a 100% juice blend, in Denver.

Smucker in 1984 acquired R.W. Knudsen & Sons, a California marketer of health juices. Three years later it decided to test the market potential for vegetable juice.

"We came to want to take a harder look at how the market developed," said a source at Smucker. "And we concluded it was a growth segment, dominated by V-8."

Smucker isn't actively advertising Hearty Vegetable Juice in Denver. Wyse Advertising, New York, is the company's agency. Smucker markets its other juices primarily in West Coast markets.

The segment is benefiting from consumer interest in nutritious foods and a successful new ad campaign from Campbell.

V-8 "was in the doldrums" as recently as 1985, said David Hackney, Campbell manager of public relations.

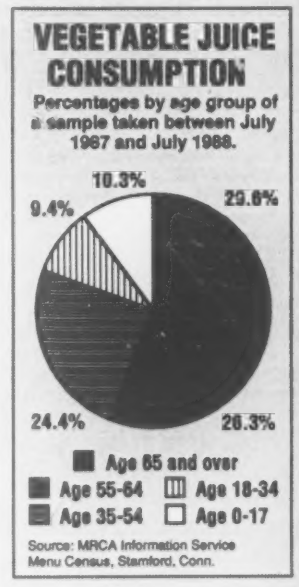
In summer 1986, the company switched the V-8 account to Saatchi & Saatchi, London, parent of then-current shop Backer Spielvogel Bates, New York. "We couldn't find acceptable creative in the U.S.," Campbell USA President Herb Baum said at the time.

Saatchi's first campaign, themed "Things don't have to be hard on you to be good for you," was aimed at health and exercise enthusiasts and didn't have a broad appeal.

But in 1987, the agency came up with a new theme, "Drink V-8, keep your diet straight," and an amusing campaign that showed people walking on a slant until they had a V-8.

The network campaign has been a rousing success, said Campbell, whose share of the $340 million red-juice market jumped to 54% in 1988 from 48% a year earlier. Campbell doesn't measure V-8 within SAMI/-Burke's blended vegetable juice segment but within the red—or tomato—juice segment.

Mr. Hackney said targeting a more general audience contributed to the brand's growth, as well as the introduction of new packaging sizes.



JOHN HALL

A hefty increase in V-8's ad budget, from $4.6 million in 1985 to an estimated $7 million in 1988, also helped boost sales, making Campbell by far the segment's biggest spender.

Cadbury-Mott's Clamato has gotten much less ad support, only $301,000 in measured media in 1987, according to Leading National Advertisers. That year, Smucker spent $182,500 on its other juices.

Still, the vegetable juice segment may need something else—possibly another strong national player—to maintain momentum and increase consumption among young adults.

A study by MRCA Information Services Menu Census found that most vegetable juice is consumed by people over age 35; people over 65 consume the largest percentage of vegetable juice—29.6% *(see chart)*.

The older age skew could be a boon, however. Baby-boomers are aging, and marketers are paying more attention to older consumers.

Vegetable juice has made gains in Canada, too. Early last year, H.J. Heinz Co. rolled national in Canada with Heinz Vegetable Cocktail.

The brand was first introduced in Ontario and Quebec in mid-1987, with rollout plans scheduled for May 1988. But by January 1988, the entry had achieved an 11.5% market share, prompting an early move national, a Heinz spokesman said.

Heinz said it has no plans yet to move Vegetable Cocktail into the U.S.

Not every marketer is optimistic about vegetable juice.

Tri-Valley Growers, a California co-op, markets Sacramento Tomato Plus Vegetable Cocktail, but a spokeswoman said the group believes the segment isn't going anywhere.

The co-op doesn't plan to support the Sacramento brand product, which at one time was marketed by Borden and has been on the market for about 20 years.#

s. ROI

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Many Happy Returns

Special Report

Stakes rise as market matures

Cautious stations, solid lineup of hits make it harder for syndicators to sell new product

By Wayne Walley

When Robin Leach first started cataloging the lifestyles of the rich and famous in 1984, TV syndicators didn't realized that someday, they could end up as subjects of the show.

Once in the business of TV reruns, syndicators today have entered an era of big bucks and broken hearts, where the rich get richer and everbody else gets squeezed out—unless they find a hit.

Ritch Colbert, former president of near-defunct Access Syndication and VP-director of programming for Television Program Enterprises, sums up the market this way: "If you are not studio-based, well capitalized and/or associated with a broadcast group, then the odds are stacked against you."

"A few years ago, business was a lot better," says Michael Eigner, VP-station manager, KTLA-TV, Los Angeles. "Stations had the flexibility to buy more programming than they might need. But stations now have a lower profit margin and people are being cautious."

The problem for syndicators today is not the failure of syndicated shows, but the spate of successes. "Wheel of Fortune," "Jeopardy" and "The Oprah Winfrey Show" already have been renewed by stations into 1992 and beyond.

"Star Trek: The Next Generation," "War of the Worlds," "Donahue," "Geraldo," "The People's Court" and "Love Connection" all perform well enough to fill a majority of available time slots on station schedules.

Top off-network series such as "The Cosby Show" and "Who's the Boss?" command record prices in syndication, selling for $4.8 million and $2.5 million per episode, respectively. These high prices force stations to schedule the shows in the most lucrative time periods to recoup costs, leaving a new show or modest off-network success in a slot with fewer viewers available.

Other forces are also at work. Fox Broadcasting Co.'s entry as a weekend programming service for independent stations removed a number of hours from the syndication marketplace.

The Home Shopping Network purchased a number of independent TV stations and switched to home shopping. And some stations, squeezed by high programming costs and a soft advertising market, have been forced into bankruptcy.

All this means fewer opportunities for newcomers. Some observers believe if two other first-run shows had lived up to expectations last fall—"USA Today On TV" and "Family Feud"—chances are some stations would not be in the market to buy any new syndicated programming this year.

"The syndication marketplace feels as if it is mature," says Mort Marcus, exec VP of Qintex Entertainment. "Business is bad because some stations have high debt, and there is a soft national advertising market. The stations cannot afford the cash outlay for programming.

"But the fact is that first-run syndication is a major growth area. There's more product today and more first-run shows among the top 30 shows in syndication than ever before," he adds.

While many agree the syndication business is maturing, making it tougher for the smaller outfits to succeed, most say there's room for expansive bottom-line growth and the possibility that an outsider can still come in with a hit.

One winning show can make all the difference for a distribution company. With "RollerGames" in its fold, many more doors are opening for the Qintex sales staff. *(See story on Page S-2)*

Chuck Larsen, president-domestic TV distribution, Republic Pictures Corp., says the fact that some shows are being renewed for up to five years in advance is merely a phase, and that the industry is far from mature.

"There has been a shake-out at the station level and it will go through more settling, but as long as the home run and megabucks are possible, more people will want to play," he says.

Most industry experts agree that no matter how tight the schedules are, one hot property can command record prices and help the industry grow financially.

Phil Corvo, president of the National Association of Television Program Executives International, says the syndication market will earn an aggregate $3 billion during the 1988-89 season from program sales and barter advertising.

The Advertiser Syndicated Television Association expects barter revenues alone to top $1 billion this year, about 10% higher than last year.

"On a revenue basis, syndication is not mature," says Derk Zimmerman, president, Group W Productions. "Studies indicate barter syndication could be a $3 billion business by the mid 1990s, topping national cable ad sales. Program syndication will also get up to the $3 billion level."

But Mr. Zimmerman says that, at the same time, it has become more difficult to break into the market.

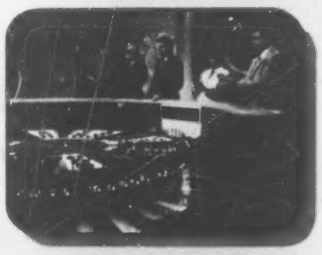
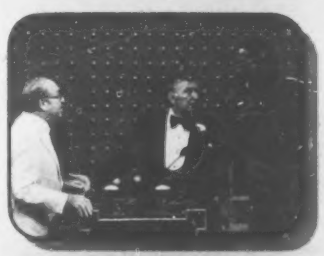
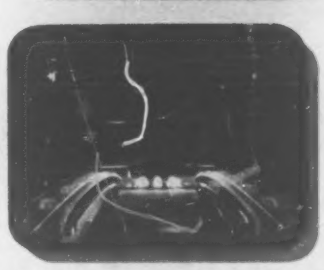
"Last year not one breakthrough hit emerged," he says. "Part of the problem is station programmers have higher than appropriate expectations and are less willing to give the time and attention to develop and nurture a program."

While media buyers say network TV, even with smaller audiences, will continue to be the vehicle of choice for advertisers that need to reach a mass audience on a timely basis, syndication is fast becoming a part of the mix. When the syndication market does reach total maturity, it is likely there will always be room for an outsider to make it big with a single hit. And chances are, plenty will keep trying.

"You can cite the odds of winning a jackpot to slot machine players in Las Vegas, but they will still put the quarter in," Mr. Larsen says.

Syndication

Ratings roll for top five hits

1984		1988
	**Wheel of Fortune** → dist. by King World 13.9 rating, 29% share	
	Jeopardy → dist. by King World 11.2 rating, 27% share	
	M*A*S*H ← dist. by Twentieth Century Fox; 8.6 rating, 22% share	
	**Oprah Winfrey Show** → dist. by King World 10.6 rating, 33% share	
	Three's Company ← dist. by D.L. Taffner 8.3 rating, 22% share	
	PM Magazine → dist. by Group W Television Sales 7.6 rating, 16% share	
	Family Feud (p.m.) ← dist. by LBS Communications 7.3 rating, 17% share	
	**Donahue** → dist. by Multimedia 7.2 rating, 27% share	
	PM Magazine ← dist. by Group W Television Sales 6.8 rating, 16% share	

Source: July 1988 ratings—Nielsen Media Research—NTI figures; July 1984 ratings Nielsen's Cassandra report.

December consumer magazine ad linage

	Current month 1988	1987	Year-to-date 1988	1987
Auto cycle rec. vehicles				
ATV Sports	23 4	54 1	329 8	522 3
AutoWeek (52X)	221 1	140 4	2 048 0	1 826 0
Car & Driver	97 3	104 6	1 227 4	1 131 6
Car Collector & Car Classics	20 5	18 3	209 9	209 8
Car Craft	57 6	58 6	965 2	999 2
Circle Track	66 3	58 4	950 3	891 6
Cycle	45 0	22 2	505 3	487 7
Cycle World	39 4	36 0	546 8	569 7
Dirt Rider	39 4	45 2	454 8	446 9
Dune Buggies & Hot Rods	70 8	71 0	881 9	906 6
Family Motor Coaching	141 3	149 0	2 053 3	1 865 6
4 Wheel & Off-Road	99 1	78 5	1 074 1	1 058 1
Four Wheeler	95 0	91 0	1 086 0	1 043 0
Hot Rod	75 6	58 6	1 038 3	876 2
Motorcyclist	33 1	23 1	485 5	524 5
Motor Trend	85 2	73 1	928 9	896 6
Motorhome	96 3	77 5	1 121 2	1 009 0
Rider	29 7	26 5	457 8	459 9
Road & Track	106 0	97 1	1 244 0	1 202 2
Trailblazer	48 5	56 0	756 7	650 6
Trailer Life	92 3	93 4	1 178 1	1 245 9
Total Group	**1,582.9**	**1,432.5**	**19,543.4**	**18,822.9**
% change	**10.5%**		**3.8%**	
Boating & yachting				
Boating	107 8	127 5	1 843 8	1 767 7
Chesapeake Bay	39 3	31 5	621 0	548 5
Cruising World	109 6	108 9	1 453 3	1 502 6
Lakeland Boating (11X)	73 0	69 5	882 9	785 6
Motor Boating & Sailing	119 1	123 1	1 814 3	1 903 3
Sail	85 6	60 7	1 295 8	1 237 5
Trailer Boats (11X)	—	—	664 3	571 0
Western Boatman (6X)	—	—	300 3	216 1
Yachting	108 3	111 5	1 694 1	1 679 7
Total Group	**642.7**	**632.7**	**10,569.8**	**10,211.9**
% change	**1.6%**		**3.5%**	
Civic fraternal				
American Legion	23 7	21 5	426 1	396 7
Elk (10X)	—	—	171 5	196 2
Kiwanis	—	—	160 1	179 5
Lion (10X)	7 1	5 3	68 7	88 9
Rotarian	19 5	14 6	207 3	180 4
V F W (11X)	25 2	29 0	343 1	319 4
Total Group	**75.5**	**70.4**	**1,376.8**	**1,361.1**
% change	**7.2%**		**1.2%**	
General				
American Health (10X)	47 5	47 9	668 4	706 1
American Heritage (8X)	35 6	27 8	351 6	263 8
American West (6X)	—	—	202 6	213 5
The Atlantic A	32 9	46 0	493 2	465 0
Bon Appetit A	105 5	113 6	1 041 5	1 020 4
Cable Guide	35 9	22 7	389 0	283 0
Changing Times	61 2	75 2	687 1	780 2
Conde Nast's Traveler	52 8	40 7	624 0	198 7
Connoisseur	108 1	101 5	1 076 1	994 7
Consumers Digest (6X)	—	—	145 1	145 3
Ebony	93 4	104 0	1 201 5	1 126 1
Fifty Plus	38 6	23 3	392 8	447 2
Finance (10X)	38 2	47 7	357 2	484 3
Food & Wine	94 8	101 5	711 5	758 3
Games (6X)	—	—	74 1	82 2
Golden Years	34 5	44 8	384 5	366 7
Gourmet	144 9	156 4	1 284 6	1 315 9
Harper's Magazine A	30 5	25 4	385 1	361 5
Harrowsmith (6X)	—	—	313 7	289 2
Islands Magazine	—	—	301 0	237 3
Let's Live	45 0	42 0	584 0	544 0
Life	106 5	70 0	768 4	582 8
Modern Maturity (6X)	36 0	25 5	214 2	253 8
Money	127 0	146 9	1 408 2	1 566 5
Money Maker	3 2	6 0	45 0	42 8
National Geographic	37 7	18 0	282 9	242 3
National Geographic Traveler (4X)	35 9	34 0	154 6	151 0
Natural History	25 8	31 7	451 4	423 2
Prevention	43 3	40 2	644 1	723 2
Psychology Today	26 0	27 9	337 4	360 9
Reader's Digest A	145 4	122 1	1 239 2	1 181 6
Saturday Evening Post (9X)	31 6	30 8	313 3	356 5
Smithsonian	111 6	100 1	1 077 0	1 061 7
Town & Country	168 1	182 3	1 680 3	1 702 7
Travel Holiday	49 9	35 7	658 8	611 8
Travel & Leisure	133 6	98 2	1 402 8	1 227 1
Vanity Fair	144 9	106 0	1 188 6	868 0
Writer's Digest	26 5	27 8	348 6	341 3
Yankee	55 3	68 1	897 3	963 6
Total Group	**2,307.4**	**2,191.6**	**24,780.4**	**23,744.2**
% change	**5.3%**		**4.4%**	
Home				
Americana (6X)	—	—	100 0	126 7
Architectural Digest A	154 3	125 0	1 827 2	1 574 6
Better Homes & Gardens	145 1	143 9	1 457 7	1 423 5
Colonial Homes (6X)	—	—	365 1	379 7
Columbus Monthly-Homes (4X)	—	—	150 5	120 1
Cooking Light	—	—	236 2	146 5
Country Home (6X)	—	—	358 5	340 7
Country Living	89 6	82 7	1 122 2	1 066 8
Family Handyman (10X) A	—	—	472 2	496 5
Florida Home & Garden	102 0	49 3	926 7	514 0
Flower & Garden (6X)	—	—	214 9	212 0
Home	43 2	29 1	713 5	621 4
Home Mechanics	36 4	42 8	623 8	688 8
The Homeowner (10X)	—	—	313 6	327 5
Horticulture	38 6	42 5	459 2	441 7
House Beautiful	50 0	51 9	852 5	863 0
House & Garden	88 5	92 5	1,115 2	1,161 9
Metropolis	62 2	50 0	688 2	635 6
Metropolitan Home	75 8	61 4	1 056 4	801 5
Midwest Living	—	—	329 5	229 3
1 001 Home Ideas	48 0	38 5	687 3	615 3
Organic Gardening	30 2	46 4	497 8	565 4
Phoenix Home/Garden	77 8	75 0	897 3	908 8
Practical Homeowner	—	—	357 2	426 1
San Diego Home/Garden	75 6	80 3	844 1	789 2
Southern Accents (6X)	92 1	105 8	779 9	705 8
Southern Living	132 5	103 5	1 501 2	1 451 9
Sunset Magazine A	107 2	109 9	1 487 1	1 475 7
Workbench (6X)	—	—	235 5	281 7
Total Group	**1,448.9**	**1,330.6**	**20,670.5**	**19,391.8**
% change	**8.9%**		**6.6%**	
In-flight & other passenger				
Aboard Group (6X)	—	—	226 8	176 5
Alaska Airlines	55 6	54 8	666 4	654 5
America West Airlines	72 7	63 3	775 2	622 2
American Way (24X)	114 9	130 7	1,679 9	1 403 6
East/West Network				
Continental Profiles	71 0	—	646 4	—
Eastern Review	71 9	59 8	723 9	803 6
Northwest	59 0	41 3	513 4	563 8
Pan Am Clipper	50 3	53 0	549 4	555 8
Southwest Sprit	74 8	48 0	779 0	712 4
TWA Ambassador	59 3	50 8	592 0	609 5
Vis A Vis	86 6	58 3	815 4	727 9
Halsey Publication				
Delta Sky	77 3	86 7	976 4	995 9
Pace Communications				
Piedmont Airlines	73 6	78 1	1 141 9	1 082 1
US Air	52 4	52 5	734 5	642 0
Spirit of Aloha (6X)	24 8	34 1	254 6	379 2
Total Group	**944.3**	**811.3**	**11,075.2**	**9,928.9**
% change	**16.4%**		**11.5%**	
Men's				
Esquire A	149 0	140 2	1 295 1	1 155 8
Firehouse Magazine	30 8	46 5	539 8	548 9
Gentlemen's Quarterly A	206 1	208 4	2 169 7	1 949 5
M Magazine	72 7	78 5	921 8	910 9
Muscle & Fitness	140 3	126 0	1 497 4	1 494 4
Penthouse A	48 5	55 9	526 1	502 9
Playboy A	80 0	61 5	579 4	658 1
Salute (10X)	20 0	—	288 6	216 4
Total Group	**747.3**	**716.9**	**7,917.8**	**7,436.9**
% change	**4.2%**		**6.5%**	
Metropolitan				
Atlanta	94 5	81 8	875 9	755 0
Baltimore	90 0	89 4	844 4	942 3
Boston	202 9	212 6	1,763 5	1,819 0
California	72 0	69 3	798 1	736 6
Chicago	141 6	142 3	1,413 6	1,304 0
Chicago's North Shore	105 5	111 2	1,122 9	1,061 8
Cincinnati	37 8	78 8	595 7	781 3
Cleveland	97 2	110 0	740 0	859 8
Coast (39X)	45 8	51 4	2,038 5	2,384 8
Columbus Monthly	67 2	79 4	852 9	880 6
Connecticut	109 4	106 3	1,267 1	1,215 9
D Magazine	76 5	125 9	1,036 1	1,360 4
Denver	61 5	65 5	434 5	466 5
Detroit Monthly	132 7	160 3	1,083 2	1,042 5
Grand Rapids	39 3	43 8	497 3	516 7
Gulfshore Life (10X)	84 0	73 0	819 0	760 0
Honolulu	61 2	84 2	739 2	880 8
Houston Metropolitan Mag	56 9	69 1	693 8	838 2
Inside Chicago	—	—	231 5	159 2
Louisiana Life	—	—	209 6	233 0
Madison	44 0	76 0	452 0	768 9
Memphis	89 3	89 0	1,011 5	963 1
Mid Atlantic Country	21 5	25 5	424 3	400 3
Milwaukee	65 2	101 2	691 9	789 6
Minneapolis/St Paul	115 5	132 3	1,286 9	1,287 7
Minnesota Monthly Magazine	51 0	57 6	544 8	563 5
Nashville	68 0	59 0	560 0	535 0
New England Monthly	64 7	66 5	611 9	567 5
New Jersey Monthly	104 4	94 0	1,245 5	1,140 2
New Mexico	52 2	39 5	486 2	408 6
Ohio	37 7	41 5	675 4	720 1
Orlando	97 6	82 0	1,060 5	1,082 9
Palm Beach Life	96 0	102 8	785 7	784 7
Palm Springs Life	109 5	119 8	1,354 9	1,388 4
Philadelphia	164 0	167 1	1,860 3	1,818 6
Pittsburgh	73 3	78 2	844 5	843 3
Rhode Island Monthly	59 0	—	405 0	—
Sacramento Magazine	88 0	67 0	851 0	564 0
St Louis	57 0	65 6	537 8	774 3
San Diego	162 1	181 5	1,822 2	1,734 4
San Francisco Focus	140 2	129 6	1,260 9	1,249 3
South Florida Magazine	112 2	104 4	1,247 7	758 3
Texas Monthly	133 7	167 2	1,223 1	1,271 2
Twin Cities	103 0	79 9	959 8	857 3
The Virginian (6X)	—	—	368 1	361 1
Washington (7X)	58 0	54 8	519 7	421 8
The Washingtonian	167 0	170 3	1,8[illegible]	1,922 6
Total Group	**3,909.8**	**4,106.3**	**43,03[illegible]**	**42,975.2**
% change	**-4.8%**		**0.1%**	
Music/entertainment				
Audio	119 4	106 3	1,268 3	1,224 8
Dance Magazine	60 0	58 5	637 0	691 5
Playbill	67 5	65 9	649 3	570 2
Video Magazine	81 5	76 0	783 5	834 9
Total Group	**328.5**	**306.6**	**3,338.2**	**3,320.5**
% change	**7.1%**		**0.5%**	
Outdoor & sport				
Alaska	40 2	41 0	422 1	429 9
The American Handgunner (6X)	—	—	320 0	290 0
American Hunter	13 8	16 7	287 8	262 6
American Rifleman	12 9	16 3	307 4	294 0
Bass Master (10X) A	43 5	40 0	742 7	624 3
Bicycling (9X)	81 1	65 8	1,106 3	883 4
Ducks Unlimited (6X)	—	—	189 4	217 5
Field & Stream	54 0	53 0	987 5	1,007 3
Fins & Feathers A	24 1	29 0	175 4	340 2
Fishing World (6X)	—	—	201 9	210 8
Florida Sportsman	119 4	107 8	1,[illegible]	1,390 1
Golf Digest	114 9	101 5	[illegible]	1,163 0
Golf Illustrated	40 0	30 3	[illegible]	261 4
Golf Magazine	59 8	61 4	1,037 5	879 0
Gun Dog (6X)	—	—	193 3	181 0
Guns	48 0	38 0	476 0	414 0
Guns & Ammo	63 7	53 1	647 6	609 8
In-Fisherman (6X)	—	—	—	—
Outdoor Life	70 6	54 2	938 9	961 4
Outside Magazine	54 8	54 4	684 7	653 0
Petersen's Hunting	65 3	59 0	673 3	669 8
Runner's World (12X)	29 6	30 6	438 3	441 1
Salt Water Sportsman	69 3	69 8	1,350 1	1,188 4
Shooting Times	31 2	34 8	472 9	453 6
Sierra (6X)	—	—	252 5	238 7
Ski (8X) A	214 9	167 9	988 7	961 4
Skiing (7X) A	165 0	175 4	931 8	1,006 7
Skin Diver	118 9	106 5	1,381 0	1,254 3
Southern Outdoors (9X)	—	—	562 0	461 0
Southern Saltwater (8X)	—	—	312 6	224 4
Sport Magazine	35 6	48 0	432 0	487 9
Sports Afield	62 1	51 0	859 8	950 7
Tennis	47 8	46 5	889 8	836 7
Waterski (8X)	—	—	604 1	442 0
Western Outdoors (10X)	—	—	424 8	414 5
Wildfowl (6X)	25 5	26 6	140 3	116 2
WindRider (8X)	—	—	420 4	357 3
Wing & Shot (6X)	—	—	83 8	69 1
World Tennis	19 5	23 6	623 8	386 5
Total Group	**1,725.4**	**1,602.2**	**23,690.2**	**22,033.1**
% change	**7.7%**		**7.5%**	
Photography				
American Photographer	32 3	48 0	381 3	470 5
Petersen's Photographic	27 8	41 0	328 7	355 5
Popular Photography	103 9	110 5	989 4	953 0
Total Group	**164.0**	**199.5**	**1,699.4**	**1,779.0**
% change	**-17.8%**		**-4.5%**	
Science/electronic/mech				
Discover	31 1	37 5	422 0	523 8
Home Office Computing	57 4	56 5	527 9	520 3
Omni	86 7	83 4	795 0	754 6
Personal Computing	202 6	309 2	2,564 5	2,282 5
Popular Mechanics	82 5	80 3	952 6	1,003 9
Popular Science	70 3	62 3	817 7	839 8
Scientific American	40 1	63 7	496 5	559 7
Spectrum	63 9	70 3	781 3	795 9
Total Group	**634.6**	**763.1**	**7,357.5**	**7,280.4**
% change	**-16.8%**		**1.1%**	
Woman/fashion/service				
Beauty Digest (6X)	17 3	12 3	138 2	64 7
Bride's Magazine (6X) A	436 0	374 8	2,859 9	2,476 7
Cosmopolitan A	160 2	166 5	2,238 1	2,267 2
Elle Magazine	183 8	178 8	2,251 2	2,083 9
Essence	—	—	—	—
Family Circle (17X) A	164 2	192 9	1,856 5	1,648 5
Glamour	150 5	134 4	2,049 7	2,222 0
Good Housekeeping A	160 9	159 4	1,626 4	1,707 2
Harper's Bazaar	1[illegible]	93 0	1,444 5	1,605 3
Health	[illegible]	34 4	421 1	526 4
Imagen	184 0	154 0	1,110 0	821 0
Ladies' Home Journal	141 7	137 6	1,379 8	1,296 7
Mademoiselle	118 4	111 0	1,779 4	1,779 4
McCall's	115 0	101 7	1,047 3	1,146 1
Military Lifestyle (10X)	—	—	513 1	509 8
Modern Bride (6X)	316 6	272 0	2,223 5	1,993 0
Ms	32 0	42 9	378 1	507 3
New Woman	85 2	82 1	1,024 2	970 2
Parents Magazine A	142 0	127 3	1,399 5	1,377 8
Redbook	98 7	102 8	1,201 2	1,216 5
Savvy	47 7	36 8	569 6	447 5
Self	72 6	60 5	1,246 7	1,194 3
Seventeen	62 8	80 9	1,394 7	1,459 6
Shape	64 1	60 3	990 3	901 4
Soap Opera Digest (26X)	23 7	21 7	298 0	259 9
Soap Opera Update	4 0	—	114 5	—
Teen Magazine	36 9	51 1	632 3	710 0
True Story A	46 8	52 7	593 3	599 0
Vogue	245 4	223 9	3,315 0	3,302 7
W Magazine	76 7	68 2	1,428 6	1,493 3
Weight Watchers	22 3	24 6	389 2	368 9
Woman (10X)	40 0	37 0	426 5	325 4
Woman's Day (15X) A	157 9	140 8	1,669 6	1,677 4
Workbasket	—	—	253 2	328 4
Working Mother	—	—	—	—
Working Woman	82 1	89 0	1,168 2	1,164 9
Total Group	**3,615.6**	**3,425.0**	**41,431.2**	**40,452.2**
% change	**5.6%**		**2.4%**	
Youth				
Boys' Life	32 3	24 9	228 3	204 0
Campus Life (10X)	53 5	56 8	469 4	496 7
Total Group	**85.9**	**81.8**	**697.6**	**700.7**
% change	**5.0%**		**-0.4%**	
Business/national				
Barron's	121 9	154 6	2,114 7	2,528 6
Black Enterprise	55 1	71 1	911 9	832 4
Business Month	—	—	—	—
Business Week (52X) A	444 9	454 3	4,588 3	4,708 9
Financial World (26X)	68 5	77 4	680 9	742 3
Forbes (26X)	281 2	245 8	3,458 0	3,626 2
Fortune (26X)	307 8	255 9	3,237 4	3,022 8
Frequent Flyer	42 0	42 0	571 9	689 3
Futures	119 8	84 9	794 4	783 3
Inc. Magazine	124 8	144 5	1,247 0	1,207 9
Income Opportunities	81 5	89 9	926 2	862 9
Industry Week (25X) A	61 6	46 7	1,097 2	1,035 1
Nation's Business (12X) A	31 2	49 4	432 6	415 2
Venture	56 8	94 0	700 8	822 0
Total Group	**1,797.0**	**1,810.4**	**20,761.1**	**21,276.9**
% change	**-0.7%**		**-2.4%**	
Business/regional				
Advantage-Nashville's Bus Mo	84 0	—	727 0	627 5
Arizona Bus Gazette (52X)	73 5	101 9	789 2	933 9
Baltimore Bus Jrnl	113 6	84 6	1,061 7	1,054 2
Boston Bus Jrnl (52X)	124 2	131 5	1,439 2	1,693 0
Buffalo First of Buffalo	95 0	74 3	870 3	796 4
Chicago Bus Jrnl-Milwaukee	112 7	95 9	1,773 8	1,579 2
Cincinnati Bus Jrnl-Sacramento	114 4	113 4	1,052 2	876 2
Columbus North Carolina	35 8	37 5	431 5	522 3
Dallas/Fort Worth Capital Dist. Bus Review (52X)	81 9	73 1	1,074 2	976 0
Caribbean Business	126 0	163 0	1,700 0	1,767 0
Corporate Rpt Minnesota	66 0	69 0	873 5	912 0
Crain's Chicago Bus (52X)	143 1	134 0	1,802 1	1,849 0
Crain's Cleveland Bus (52X)	71 6	59 7	890 5	777 6
Crain's Detroit Bus (52X)	91 3	72 8	984 3	960 9
Crain's New York Bus (52X)	45 0	38 0	621 0	479 0
Florida Trend (13X)	43 8	64 2	717 4	904 1
Georgia Trend	28 8	40 9	634 9	780 5
Grand Rapids Bus Jrnl	40 3	31 3	627 2	547 8
Hawaii Business	36 5	39 3	588 7	556 2
Houston Bus Jrnl (52X)	54 0	44 0	838 0	740 5
Indianapolis Bus Jrnl (52X)	156 1	137 1	1,888 2	1,785 4
Manhattan Inc	61 9	61 3	777 4	883 8
New England Bus (20X) A	30 3	52 3	678 5	859 1
New Orleans City Bus	31 5	51 2	544 0	670 3
Pacific Bus News (52X)	112 0	107 2	1,298 0	1,392 9
Pittsburgh Bus Times (52X)	151 7	223 5	593 2	724 1
Providence Bus News	93 5	74 3	1,030 3	856 3
Regardie's/Washington Review Publication	131 0	143 0	1,753 0	1,770 0
Broward Review	61 9	38 4	731 3	429 0
Miami Review	64 1	50 3	782 7	586 2
Palm Beach Review	73 7	33 0	711 5	331 8
San Jose Bus Jrnl	68 0	—	878 0	—
St Louis Bus Jrnl (52X)	136 2	152 9	1,398 3	1,612 3
Warfield Monthly Baltimore	60 8	47 1	816 7	775 2
Total Group	**2,804.2**	**2,639.9**	**33,377.5**	**32,009.7**
% change	**6.2%**		**4.3%**	
National Sunday mags				
Parade (52X)	43 1	50 5	663 8	616 6
USA Weekend (52X)	33 3	40 9	552 5	486 4
Vista Magazine	23 2	15 6	232 3	158 7
Total Group	**99.5**	**106.9**	**1,448.6**	**1,261.7**
% change	**-6.9%**		**14.8%**	
Newspaper Sunday magazine				
Boston Globe	156 3	193 0	2,215 0	2,569 0
Chicago Tribune	145 1	139 0	1,394 6	1,362 2
Cleveland Plain Dealer	102 7	73 5	856 9	811 8
Columbus Dispatch	37 8	31 0	366 1	435 5
The Dallas Morning News	41 0	58 0	771 0	897 0
Detroit Free Press	47 6	54 9	584 5	640 0
L A Times	117 0	91 6	956 6	769 1
Louisville Courier-Jrnl	35 0	42 0	457 0	645 0
New York Times Mag	336 4	269 9	4,112 4	4,112 3
Philadelphia Inquirer	100 5	79 5	1,129 4	918 0
Seattle Times	88 0	83 0	894 0	825 0
St Louis Post Dispatch	73 2	82 4	973 6	918 4
Toledo Blade Magazine	26 8	37 9	385 7	470 5
Washington Post	124 1	106 0	1,643 7	1,473 8
Total Group	**1,431.5**	**1,341.7**	**16,740.5**	**16,847.6**
% change	**6.7%**		**-0.6%**	
Weeklies/bi-weeklies				
The Advocate (26X)	151 2	156 7	2,001 7	1,666 3
Army Times Military Group				
Air Force Times (52X)	130 7	137 0	1,943 7	1,984 9
Army Times (52X)	132 7	137 1	1,869 8	1,942 1
Navy Times (52X)	149 0	155 5	2,123 2	2,162 7
The Blood-Horse (52X)	1,296 2	1,409 9	4,273 6	5,102 6
Capper's (26X)	12 8	10 4	272 3	298 9
Commonweal (22X)	9 0	13 5	80 1	89 6
Golf World (40X)	—	—	—	—
Grit (52X) A	14 5	11 0	330 5	323 3
National Journal (50X)	40 0	38 9	846 5	766 8
National Review (25X)	39 3	47 6	441 3	433 4
New Republic (48X)	34 1	46 3	503 2	504 2
New York Magazine (50X)	358 8	307 3	3,065 9	3,134 7
New Yorker	244 9	351 2	2,293 5	2,703 2
Newsweek (52X) A	210 4	184 0	2,478 6	2,564 0
People (51X)	445 1	327 3	3,823 0	3,581 4
Rolling Stone (25X)	196 9	170 7	1,848 2	1,749 5
Sporting News (52X)	45 8	48 4	614 7	648 0
Sports Illustrated (52X)A	263 6	210 7	2,978 4	2,651 5
Time (52X) A	210 1	166 0	2,501 9	2,359 8
Travelhost (52X) C	3,145 0	3,105 0	39,148 0	38,395 0
TV Guide (52X) A	335 5	226 6	3,506 4	3,626 4
US Magazine (26X)	80 8	71 7	671 3	617 8
U.S. News & World Report (50X) A	216 4	183 6	1,877 0	1,708 7
Total Group	**7,762.8**	**7,516.1**	**79,492.6**	**79,014.7**
% change	**3.3%**		**0.6%**	

NOTES (X) represents the number of times published each year. publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. All figures represented in this table are supplied by the magazines. AD AGE makes no attempt to verify them and therefore is not responsible for inconsistencies or errors.